



Sessions 3-5:

VA TMS Training for Domain Managers, Learning Managers, and Item Managers

VA TMS Administrators
Role-Based Training

Virtual Instructor-Led Training

Participant Guide

April 2014

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3.0 Training Content: Session 4 (Part 2 of 3)

3.1 Welcome

VA Talent Management System

**VA TMS Part 2 of 3 – Training for Domain Managers,
Learning Managers, Item Managers**

Registration Questions/No TRAIN ADMIN ID?
Email: clarence.bashshar@va.gov

Please complete the following BEFORE training begins:

1. **Audio:** Dial into the VANTS line
2. **Presentation & Demonstrations:** Adobe Connect
3. **Download & Print Training Materials:** VA TMS Training SharePoint site
4. **Sign In to VA TMS TRAIN:** <https://va-train2.plateau.com/learning/admin/login.do>. Use your TRAIN ADMIN ID and PASSWORD

Notes:

Slide 1: Session Preparation

VA Talent Management System

VA TMS Administrators Role-Based Training:
**Part 2 of 3 – Training for Domain Managers,
Learning Managers, and Item Managers**



 **ADVANCE**
TRANSFORMING POTENTIAL INTO PERFORMANCE

 **VALU**
VA Learning and Development

An HRSA initiative to assist in people development, talent acquisition and workforce engagement for the delivery of high quality healthcare services and other services to veterans and their families.

Notes:

Slide 2: VA TMS Administrators Role-Based Training:
Part 2 of 3

Learning Needs Management 2 of 3 VA Talent Management System

Session Agenda

- Welcome and Introductions
- Lesson 1: Curriculum Main Concepts
- Lesson 2: Main Areas of Curriculum Record
- Lesson 3: Requirements
- Question and Answer

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Notes:

Slide 3: Session Agenda

Learning Needs Management 2 of 3 VA Talent Management System

Session Objectives

After completing this session, you will be able to:

- Create, configure, and modify curricula, including adding subcurricula and requirements
- Configure and modify event-based retraining dates for items within curricula

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Notes:

Slide 4: Session Objectives

Learning Needs Management 2 of 3

VA Talent Management System

Introductions

- Name
- Division of VA
- Experience with VA TMS
- Personal training goal

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Notes:

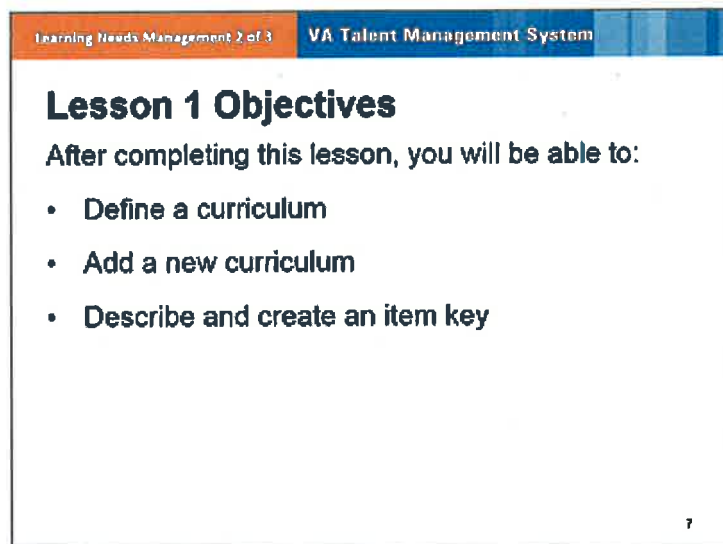
Slide 5: Introductions

3.2 Lesson 1: Curriculum Main Concepts



Notes:

Slide 6: Lesson 1: Curriculum Main Concepts



Notes:

Slide 7: Lesson 1 Objectives

Learning Needs Management 2 of 3 VA Talent Management System

Curriculum

- A curriculum is a grouping of one or more items for the purpose of assignment and tracking as a single entity
- Curricula provide the functionality to recalculate required-by dates on items that have been completed but must be repeated on a recurring basis

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Notes:

Slide 8: Curriculum

Learning Needs Management 2 of 3 VA Talent Management System

Grouping Items

Curriculum: <ul style="list-style-type: none">• Item A• Item B• Item C <hr/> <p>Collectively known as</p> <ul style="list-style-type: none">• Item D	User's To-Do List: <ul style="list-style-type: none">• Item A• Item B• Item C User's Learning History: <ul style="list-style-type: none">• Item D
---	--

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Notes:

Slide 9: Grouping Items

Learning Needs Management 2 of 3 VA Talent Management System

Characteristics of Curricula

1. Items can be used in one or multiple curricula with different date and requirement settings in each
2. Modifications made to a curriculum have an immediate impact on all users who have the curriculum currently assigned
3. Curricula can be linked to a job code or assigned with an assignment profile and are automatically assigned when a user is given that job code or meets the profile attributes
4. Curricula can contain requirements to complete
 - # of hours
 - # of hours from an item pool
 - # of items from an item pool

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Notes:

Slide 10: Characteristics of Curricula

Learning Needs Management 2 of 3 VA Talent Management System

Curriculum Statuses

Curricula can have one of two statuses:

- Complete:
 - All items are complete
 - The effective date is in the future
 - Requirements have been met
- Incomplete:
 - Newly assigned curriculum with effective date in the past
 - Required items not complete
 - Retraining date has passed
 - Revisions have been made
 - Requirements have not been met

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Notes:

Slide 11: Curriculum Statuses

Learning Needs Management 2 of 3 VA Talent Management System

Curriculum ID


- The Curriculum ID is a unique identifier in the VA TMS database
- The ID naming convention for curricula is:
LLL-XXXX (L=Location/Domain, X=Alpha character)

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Notes:

Slide 12: Curriculum ID

Learning Needs Management 2 of 3 VA Talent Management System



Demonstration: Add a New Curriculum

13

Notes:

Slide 13: Demonstration: Add a New Curriculum



Demonstration: Add a New Curriculum

1. Navigate to **Learning > Curricula**.
2. Select **Add New**.

NOTE: You can also enter **Add Curriculum** into the Search field below the button bar and select **Go**.

3. Enter a curriculum ID.
4. Enter a title for the curriculum.
5. Enter a description of the curriculum, if desired.
6. Leave the creation date set to the default.
7. Select a domain.
8. Select a curriculum type from the drop-down menu.
9. Leave the **Force Incomplete checkbox** unchecked.


NOTE: When you select the Force Incomplete checkbox, the system calculates whether the status should be complete or incomplete based on the user's latest attempt at completing the item. If the user's latest attempt is incomplete, the system calculates the expiration and required dates based on the date and time of the last unsuccessful attempt.

10. Select **Add**.

Learning Needs Management 2 of 3 VA Talent Management System

System Login

- Go to <https://va-train2.plateau.com/learning/admin/login.do>
- Enter your TRAIN Admin Username
- Enter your TRAIN Admin Password



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Notes:

Slide 14: System Login

Learning Needs Management 2 of 3 VA Talent Management System

Activity #1: Add a New Curriculum

System Practice



15

Notes:

Slide 15: Activity #1: Add a New Curriculum



Activity #1: Add a New Curriculum

1. Navigate to **Learning > Curricula**.
2. Select **Add New**.

NOTE: You can also enter **Add Curriculum** into the Search field below the button bar and select **Go**.

3. Enter a curriculum ID.
4. Enter a title for the curriculum.
5. Enter a description of the curriculum, if desired.
6. Leave the creation date set to the default.
7. Select a domain.
8. Select a curriculum type from the drop-down menu.
9. Leave the **Force Incomplete checkbox** unchecked.

NOTE: When you select the Force Incomplete checkbox, the system calculates whether the status should be complete or incomplete based on the user's latest attempt at completing the item. If the user's latest attempt is incomplete, the system calculates the expiration and required dates based on the date and time of the last unsuccessful attempt.

10. Select **Add**.

Learning Needs Management 2 of 3

VA Talent Management System

Curriculum Subject Areas

Subject Areas now are available with curricula.

VA Privacy & Information Security Awareness & Rules

Creation Date: 3/18/2013

Curriculum Type: Required training for groups

Force Incomplete: Yes

Related

Catalogs

Contents

Documents

Job Codes

Subject Areas

Subject Areas

7756

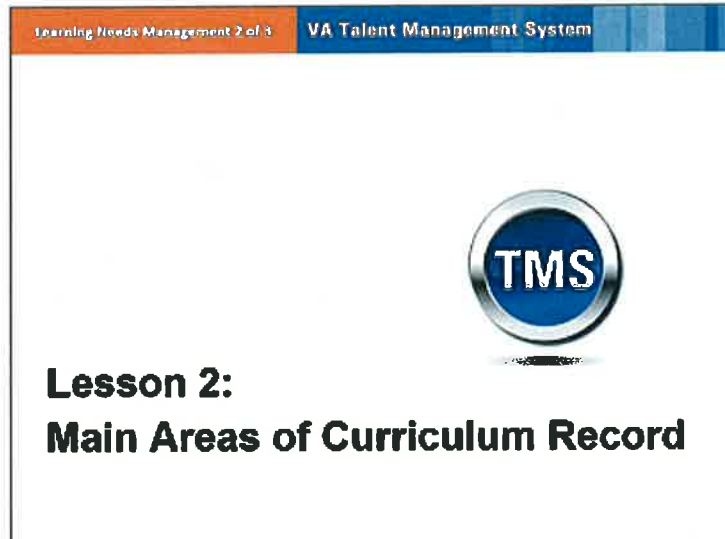
8/11/2014

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Notes:

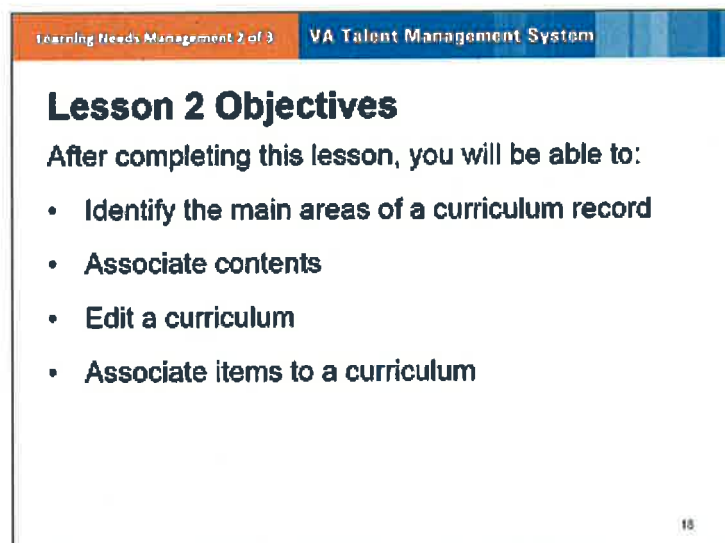
Slide 16: Curriculum Subject Areas

3.3 Lesson 2: Main Areas of Curriculum Record



Notes:

Slide 17: Lesson 2: Main Areas of Curriculum Record



Notes:

Slide 18: Lesson 2 Objectives

Learning Needs Management 2 of 3 VA Talent Management System

Curriculum Record

Once a curriculum record is added to the VA TMS, it is organized into functional areas.

Core Area

Recommended Next Wizard

Actions Area

Related Area

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Notes:

Slide 19: Curriculum Record

Learning Needs Management 2 of 3 VA Talent Management System

Demonstration: Curriculum Record

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Notes:

Slide 20: Demonstration: Curriculum Record



Demonstration: Curriculum Record

1. Navigate to **Learning > Curricula**.
2. Select **Search**.
3. Select a curricula from the search results. Once the curriculum record displays, show the following sections on the three main areas of the curriculum record:

Core Area: The Core area contains the basic curriculum record information, including curriculum title, ID, description, and type. To edit a field in this area, select in a displayed field and enter text or select a reference value (depending on the field type). Once expanded, the screen displays the following sections where updates can be made:

- Title
- Description
- Summary
- Extended Summary (used by regulated organizations for CFR21 Part 11)

Related Area: The Related area of the curriculum record contains additional information regarding the curriculum. Select the **Related** tab on the left (i.e., Assignment Profiles) to display the details on the right.

Actions Area: The Actions area of the curriculum record contains links to additional actions that can be taken on the curriculum record, including:


- Assign (initiates the batch assignment wizard)
- Send Notification (initiates the ad hoc notification wizard)
- Copy
- Delete

Learning Needs Management 2 of 3 VA Talent Management System

Associating Contents

The Contents tab in the Related area is used to view, associate, and edit one or more of the following to the curriculum:

- Items
- Requirements
- Subcurricula



ID	Name	Subcategory
ALJ-001	Adult Basic Education and Literacy	01
ALJ-002	Adult Basic Education Program	02
ALJ-003	Adult Basic Education Learning Unit	03
ALJ-004	Adult Basic Education Assessment	04
ALJ-005	Adult Basic Education Reporting	05
ALJ-006	Adult Basic Education Evaluation	06


Notes:

Slide 21: Associating Contents

Learning Needs Management 2 of 3 VA Talent Management System

Edit Curriculum

- As you add content, the system places it at the bottom of the list
- You can edit the sequencing of the content by selecting the Edit button



ID	Name	Edit
ALJ-001	Adult Basic Education and Literacy	[Edit]
ALJ-002	Adult Basic Education Program	[Edit]
ALJ-003	Adult Basic Education Learning Unit	[Edit]
ALJ-004	Adult Basic Education Assessment	[Edit]
ALJ-005	Adult Basic Education Reporting	[Edit]
ALJ-006	Adult Basic Education Evaluation	[Edit]

Notes:

Slide 22: Edit Curriculum

Learning Needs Management 2 of 3 VA Talent Management System

Items


- There is no limit to the number of items that may be added to a curriculum
- The following elements are editable in an item:
 - Initial Assignment
 - Retraining Assignment
 - Basis Date
 - Effective Date
 - Assignment Type

These are covered in the Period-Based Curriculum Advanced Topics session.

Notes:

Slide 23: Items

Learning Needs Management 2 of 3 VA Talent Management System



Demonstration: Associating Items to a Curriculum

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Notes:

Slide 24: Demonstration: Associating Items to a Curriculum




Demonstration: Associating Items to a Curriculum

1. Access the curriculum created previously in Activity #1.
2. Select the **Online Content** tab in the Related area.
3. Select **Edit**.
4. Select the **Add Content** button.
5. Select **Items** from the drop-down menu.
6. Enter criteria in the keyword field to search for the items to include in the curriculum.
7. Select **Search**.
8. Check the **Add** checkbox next to each item to add to the curriculum.
9. Select **Add**. The selected item(s) is(are) added to the contents list.
10. Select the **Edit** link next to the last listed item.
11. Enter initial assignments (number and period).
12. Select an initial basis (event).
13. Do not enter retraining assignments.
14. Enter a basis date (if not defaulted) and an effective date (use the current date).
15. Select an assignment type. Select **Required (REQ)**.
16. Select **Apply Changes**.
17. Select the **Move Up** arrow and **Move Down** arrows to sequence the curriculum content. This sets the suggested order display for users.
18. Select the **X** to close the Edit window and return to the curriculum record.

Learning Needs Management 2 of 3 VA Talent Management System

Activity #2: Associating Items to Curriculum

System Practice



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Notes:

Slide 25: Activity #2: Associating Items to Curriculum



Activity #2: Associating Items to Curriculum

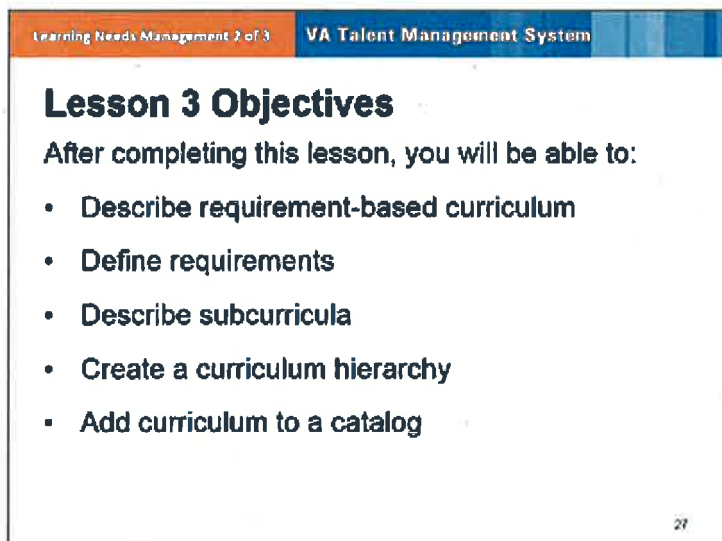
1. Access the curriculum created previously.
2. Select the **Contents** tab in the Related area.
3. Select **Edit**.
4. Select the **Add Content** button.
5. Select **Items** from the drop-down menu.
6. Enter criteria in the keyword field to search for the items to include in the curriculum.
7. Select **Search**.
8. Check the **Add** checkbox next to each item to add to the curriculum.
9. Select **Add**. The selected item(s) is added to the contents list.
10. Select the **Edit** link next to the last listed item.
11. Enter initial assignments (number and period).
12. Select an initial basis (event).
13. Do not enter retraining assignments.
14. Enter a basis date (if not defaulted) and an effective date (use the current date).
15. Select an assignment type. Select **Required (REQ)**.
16. Select **Apply Changes**.
17. Select the **Move Up** arrow and **Move Down** arrows to sequence the curriculum content. This sets the suggested order display for users.
18. Select the **X** to close the Edit window and return to the curriculum record.

3.4 Lesson 3: Requirements



Notes:

Slide 26: Lesson 3: Requirements



Notes:

Slide 27: Lesson 3 Objectives

Learning Needs Management 2 of 3

VA Talent Management System

Requirement-Based Curriculum

- Some trainings have requirements beyond a basic list that user must accomplish to complete a curriculum
 - Hours at a specific activity
 - External training
 - Additional items from a selected list of items
- Requirements act like items in a curriculum
 - Can be assigned
 - Use retraining dates
 - Impact the curriculum status

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Notes:

Slide 28: Requirement-Based Curriculum

Learning Needs Management 2 of 3

VA Talent Management System

Requirement Types

- # of Hours of specified hour type (any item, scheduled offering, or external event)
 - Total hours
 - Credit hours
 - Contact hours
 - CPE hours
- # Hours of specified hour type from pool of items (only from the defined pool of items)
 - Total hours
 - Credit hours
 - Contact hours
 - CPE hours
- Items from pool of items

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Notes:

Slide 29: Requirement Types

Learning Needs Management 2 of 3 VA Talent Management System

Example Requirement

Requirement Type: # of Hours of specified hour type from pool of items

- Curriculum 1 has four items in it:
 - Ethics 101: 4 Credit Hours
 - Ethics 102: 3 Credit Hours
 - Ethics 103: 3 Credit Hours
 - Ethics 104: 2 Credit Hours
- REQUIREMENT: complete a total of 6 credit hours from curriculum

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Notes:

Slide 30: Example Requirement

Learning Needs Management 2 of 3 VA Talent Management System

Example Requirement

Requirement Type: # of Items from Pool of Items

- Curriculum 1 has four items in it:
 - Ethics 101: 4 Credit Hours
 - Ethics 102: 3 Credit Hours
 - Ethics 103: 3 Credit Hours
 - Ethics 104: 2 Credit Hours
- REQUIREMENT: complete a total of 2 items from pool

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Notes:


Slide 31: Example Requirement

Learning Needs Management 2 of 3 VA Talent Management System

Additional Requirement Options

To allow users to choose from two or more requirements and create an "OR" requirement, you can group requirements.

1. Add more than one requirement to the curriculum.
2. In the Contents section, select Edit.
3. Select the requirements you wish to group and select Group Requirements. The result will look like this:



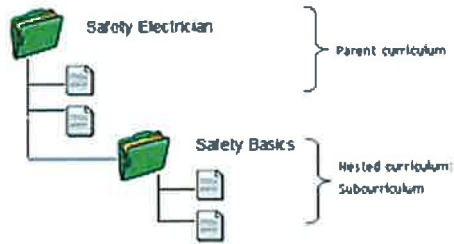
Notes:

Slide 32: Additional Requirement Options

Learning Needs Management 2 of 3 VA Talent Management System

Subcurricula

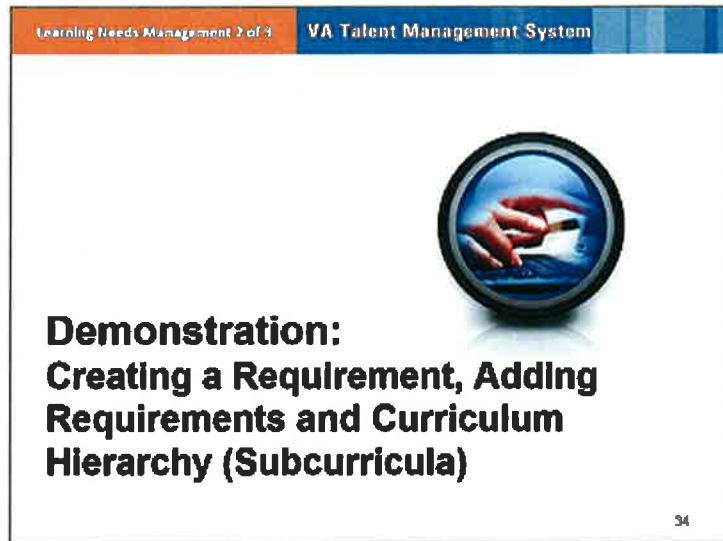
The Subcurricula option is used to create a hierarchical structure between two or more curricula



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Notes:

Slide 33: Subcurricula



Notes:

Slide 34: Demonstration: Adding Requirements and
Subcurricula



Demonstration: Creating a Requirement, Adding Requirements and Curriculum Hierarchy (Subcurricula)

Create a Requirement

1. Navigate to **Learning > Requirements**.
2. Select **Add New**.
3. Select **# Items from Pool of Items** from the Requirement Type drop-down menu.
4. Enter a requirement ID.
5. Enter a requirement description.
6. Select a domain ID.
7. Enter the creation date.
8. Leave the **Active checkbox** checked.
9. Enter any comments, as desired.
10. Select **Next**.
11. Enter the required number of items the user must complete from the pool.
12. Select the **add one or more from list** link, located under Create Item Pool
13. Enter criteria to search for items to add to the requirement pool.
14. Select **Search**.
15. Check **Add** next to each item to add to the pool.
16. Select **Add**.
17. Verify the selected items are listed in the Item Pool for Requirement section.
18. Select **Apply Changes**.
19. Select **"X"** to close the pop-up window.

Add a Requirement to a Curriculum

1. Navigate to **Learning > Curricula**.
2. Enter criteria for the curriculum to which to add requirements.
3. Select **Search**.
4. Select **Curriculum ID** to which to add a requirement.
5. Select the **Contents** tab from the Related area.
6. Select **Edit**.
7. Select **Add Content**.

8. Select **Requirements** from the drop-down menu.
9. Enter criteria to search for the desired requirements.
10. Select **Search**.
11. Check **Add** next to each requirement to add.
12. Select **Add**. The new requirement is added to the bottom of the list on the Curriculum Contents tab.
13. To make the requirement required, select the **Edit** link and enter initial, retraining, and effective date information for each requirement. Setting an effective date makes the requirement “required.”
14. Select **Apply Changes**.
15. Optional: To group requirements: If more than one requirement is added to the curriculum, check **Select** next to the requirements to group.
16. Select **Group Requirements**.
17. Enter group description, initial training, retraining assignment information, and effective date.
18. Select **Create Group**.
19. The new requirement group is added to the bottom of the list on the Curriculum Contents tab.


Create a Curriculum Hierarchy (Subcurriculum):

1. Using the curriculum created in Activity #1, select the **Contents** tab in the Related area.
2. Select **Edit**.
3. Select the **Add Content** button.
4. Select **Subcurricula** from the drop-down menu.
5. Enter criteria in the keyword field to search for the curriculum to add as the subcurricula.
6. Select **Search**.
7. Check the **Add** checkbox next to each curriculum to add as the subcurricula.
8. Select **Add**. The subcurricula is added to the bottom of the contents list.

Learning Needs Management 2 of 3 VA Talent Management System

**Activity #3: Creating a Requirement,
Adding Requirements and Curriculum
Hierarchy (Subcurricula)**

System Practice



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Notes:

Slide 35: Activity #3: Adding Requirements and
Subcurricula



Activity #3: Creating a Requirement, Adding Requirements and Curriculum Heirarchy (Subcurricula)

Create a Requirement

1. Navigate to **Learning > Requirements**.
2. Select **Add New**.
3. Select **# Items from Pool of Items** from the Requirement Type drop-down menu.
4. Enter a requirement ID.
5. Enter a requirement description.
6. Select a domain ID.
7. Enter the creation date.
8. Leave the Active checkbox checked.
9. Enter any comments, as desired.
10. Select **Next**.
11. Enter the required number of items the user must complete from the pool.
12. Select the **add one or more** from list link.
13. Enter criteria to search for items to add to the requirement pool.
14. Select **Search**.
15. Check **Add** next to each item to add to the pool.
16. Select **Add**.
17. Verify the selected items are listed in the Item Pool for Requirement section.
18. Select **Add**.

Add a Requirement to a Curriculum

1. Navigate to **Learning > Curricula**.
2. Enter criteria for the curriculum to which to add requirements.
3. Select **Search**.
4. Select **Curriculum ID** to which to add a requirement.
5. Select the **Contents** tab from the Related area.
6. Select **Edit**.
7. Select **Add Content**.
8. Select **Requirements** from the drop-down menu.

9. Enter criteria to search for the desired requirements.
10. Select **Search**.
11. Check **Add** next to each requirement to add.
12. Select **Add**. The new requirement is added to the bottom of the list on the Curriculum Contents tab.
13. To make the requirement required, select the **Edit** link and enter initial, retraining, and effective date information for each requirement. Setting an effective date makes the requirement "required."
14. Select **Apply Changes**.
15. Optional: To group requirements: If more than one requirement is added to the curriculum, check **Select** next to the requirements to group.
16. Select **Group Requirements**.
17. Enter group description, initial training, retraining assignment information, and effective date.
18. Select **Create Group**.
19. The new requirement group is added to the bottom of the list on the Curriculum Contents tab.

Create a Curriculum Hierarchy (Subcurriculum):


1. Using the curriculum created in Activity #1, select the **Contents** tab in the Related area.
2. Select **Edit**.
3. Select the **Add Content** button.
4. Select **Subcurricula** from the drop-down menu.
5. Enter criteria in the keyword field to search for the curriculum to add as the subcurricula.
6. Select **Search**.
7. Check the **Add** checkbox next to each curriculum to add as the subcurricula.
8. Select **Add**. The subcurricula is added to the bottom of the contents list.

Learning Needs Management 2 of 3 VA Talent Management System

Knowledge Check

An item can be used in multiple curricula.

- a) True
- b) False



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Notes:


Slide 36: Knowledge Check

Learning Needs Management 2 of 3 VA Talent Management System

Knowledge Check

For a curriculum status to be Complete, all items in the curriculum must be complete.

- a) True
- b) False



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Notes:


Slide 37: Knowledge Check

Learning Needs Management 2 of 3 VA Talent Management System

Knowledge Check

If an item in a subcurriculum is past its required by date, what happens to the parent curriculum?

- a) Has no effect on the overall curriculum
- b) The subcurriculum status changes to incomplete
- c) The curriculum status changes to incomplete
- d) B & C only
- e) All of the above



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Notes:

Slide 38: Knowledge Check

Learning Needs Management 2 of 3 VA Talent Management System

Documents Tab

On the Documents tab, you can:

- View the list of documents that are associated with the curriculum
- Add and delete documents from the list
- Determine whether the relationship between the corresponding version of the document and the curriculum needs to be verified

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Notes:

Slide 39: Documents Tab



Notes:

Slide 40: Demonstration: Documents Tab



Demonstration: Documents Tab

Simply show the location of the Documents tab—you do not need to add a document.

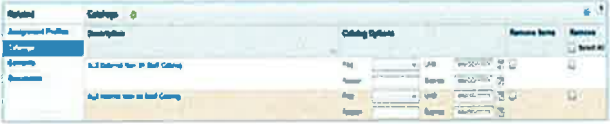
To do this, navigate to **Content > Documents**.

Learning Needs Management 2 of 3

VA Talent Management System

Adding Curriculum to Catalogs

- The Catalogs tab in the Related area of the curriculum record is used to add the curriculum to one or more catalogs
- If a user self-assigns a curriculum, he/she is held to the timeframes and assignment types set by the administrator for the curriculum




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Notes:

Slide 41: Adding Curriculum to Catalogs

Learning Needs Management 2 of 3

VA Talent Management System



Demonstration: Add Curriculum to a Catalog

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Notes:

Slide 42: Demonstration: Add Curriculum to a Catalog




Demonstration: Add Curriculum to a Catalog

1. Using the curriculum created in Activity #1, select the **Catalogs** tab in the Related area.
2. Select the **Add New Catalogs** button.
3. Enter keyword: **User** and select **Search**.
4. Check the **Add** checkbox next to any LMS user catalog. **NOTE:** The **Add Schedules** checkbox should be checked if you also want to add all items contained in the curriculum to this catalog.
5. Select **Add**.
6. Verify that the selected catalog is displayed.
7. Select the **Flag** drop-down menu.
8. Select **New** from the drop-down menu.
9. Select the **Until** calendar icon.
10. Select the last date to display the flag. **NOTE:** This date determines when the curriculum is to be automatically removed from the catalog. It is removed by the purged expired catalog APM (Assignment Profile Manager).
11. In the Reason field, enter why this curriculum is flagged (user viewable).
12. Select **Save**.

Learning Needs Management 2 of 3 VA Talent Management System

Activity #4: Add Curriculum to a Catalog

System Practice



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Notes:

Slide 43: Activity #4: Add Curriculum to a Catalog

**Activity #4: Add Curriculum to a Catalog**

1. Using the curriculum created in Activity #1, select the **Catalogs** tab in the Related area.
2. Select the **Add New Catalogs** button.
3. Enter keyword: **User** and select **Search**.
4. Check the **Add** checkbox next to any LMS user catalog.

NOTE: The **Add Schedules** checkbox should be checked if you also want to add all items contained in the curriculum to this catalog.

5. Select **Add**.
6. Verify that the selected catalog is displayed.
7. Select the **Flag** drop-down menu.
8. Select **New** from the drop-down menu.
9. Select the **Until** calendar icon.
10. Select the last date to display the flag.


NOTE: This date determines when the curriculum is to be automatically removed from the catalog. It is removed by the purged expired catalog APM (Assignment Profile Manager).

11. In the Reason field, enter why this curriculum is flagged (user viewable).
12. Select **Save**.

Learning Needs Management 2 of 3 VA Talent Management System

Knowledge Check

List the three requirement types.



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Notes:


Slide 44: Knowledge Check

Learning Needs Management 2 of 3 VA Talent Management System

Knowledge Check

External learning events count towards # Hours of specified Hour Type.

- a) True
- b) False



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Notes:

Slide 45: Knowledge Check

Learning Needs Management 2 of 3 VA Talent Management System

Knowledge Check

How do you create an OR situation with more than one requirement?



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Notes:

Slide 46: Knowledge Check

Learning Needs Management 2 of 3 VA Talent Management System

Evaluation & Self-Certification Reminder

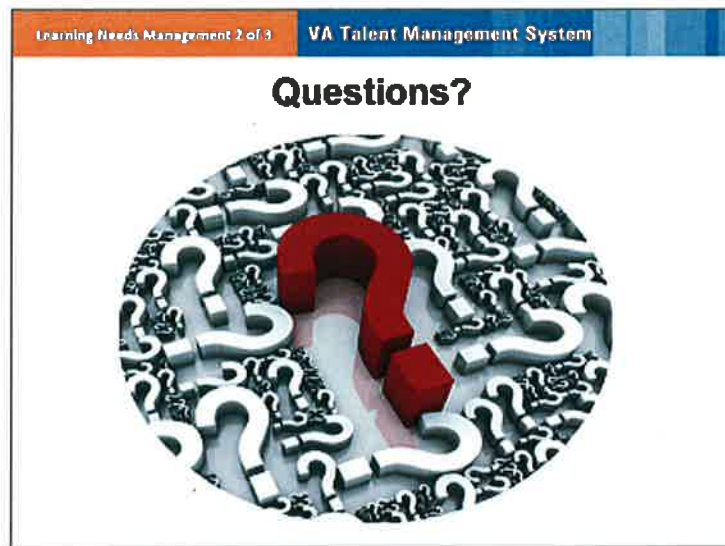
- You will be prompted to complete the Evaluation and then you can complete your Self-Certification for this session.
- Evaluations can be found on your To-Do List.



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Notes:

Slide 47: Evaluation & Self-Certification Reminder



Notes:

Slide 48: Questions?